

Retirement Application CHECKLIST

1. CHOOSE A RETIREMENT DATE

TRSL recommends that you submit your retirement application six to 12 months before your **desired** retirement date to ensure the timely processing of your application.

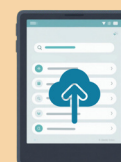
This is important because your **effective** retirement date will be either the date your properly completed application is received by TRSL or the day after your employment ends, whichever is later.



2. SUBMIT YOUR APPLICATION

You can easily apply for retirement through **myTRSL**. Visit myTRSL.org to get started.

You can also apply for retirement by submitting a completed *Application for Service Retirement, ILSB, or DROP* (Form 11), which is available at www.TRSL.org.



3. SUBMIT DIRECT DEPOSIT AND WITHHOLDING FORMS

TRSL needs to have your *Direct Deposit of Benefits* (Form 15D) on file to start paying your retirement benefit.

You also need to submit a *Withholding Certificate for Periodic Pension or Annuity Payments* (Form W-4P). Both forms are available at www.TRSL.org. Submission instructions are at the top of the forms. If you're entering DROP, these two forms are not needed until the end of employment.



4. SUBMIT SUPPORTING DOCUMENTS

You can upload your supporting documents through **myTRSL**. You can also scan them to web.master@trsl.org or mail copies to TRSL. Here's a list of what you need to submit:

☐ Social Security cards (as issued by the Social Security Administration)

☐ For you

☐ For your spouse

☐ For all other beneficiaries

☐ Death certificate if your spouse or former spouse is deceased.

☐ Birth certificates or other verification of birth

☐ For you

☐ For your spouse

☐ For all other beneficiaries

Date-of-birth verification documents are listed on page 3.

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5. MAKE SURE YOUR BENEFICIARIES ARE CURRENT*

You can view your beneficiaries in **myTRSL** or on your last member statement.

Need to make a change? Complete and submit a *Beneficiary Designation* (Form 3). Submission instructions are at the top of the form. The original is required.

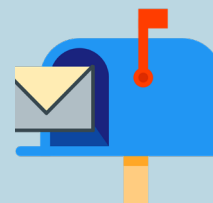
NOTE: In the event of your death within 30 days from the effective date of your retirement or DROP beginning date, the beneficiary(ies) listed on your active member record will apply only if no survivor benefits are payable.



6. CHECK YOUR MAILBOX

Once TRSL receives your Social Security card and processes your retirement application, you will receive an *Affidavit of Retirement Option Election* (Form 11E). This affidavit lists the estimated retirement benefit amount for each of the eight retirement options available through TRSL. Please select a retirement option, have the affidavit notarized, and return it to TRSL.

TRSL may request additional documentation depending on your retirement options and marital status.



7. CHECK OFF LAST REMAINING ITEMS

- ☐ Contact other state retirement systems if you have an agreement for the reciprocal recognition of service credit from those systems.
- ☐ Discuss your planned termination date, insurance deductions and payment of unused sick leave with your employer.
- ☐ Contact Social Security with any questions about Social Security or Medicare.
- ☐ Celebrate your upcoming retirement!



Retirement Application VERIFICATION DOCUMENTS

Verification of your date of birth, as well as that of your spouse and/or beneficiary, is required as part of your application for retirement. The best evidence is either:

1. A birth certificate or hospital birth record established during the first few years of life and certified by the custodian of the record, or
2. A church baptismal record established during the first few years of life that shows the date of birth.

If you do not have either of these records in your possession, try to obtain one. If a church record was made of your birth or baptism, it is probably still on file at the church. If you cannot obtain one of the documents listed above, furnish at least two of the documents listed below. Try to obtain a record that was established early in life. Additional evidence of age may be requested if the documents you submit are not sufficient.

1. A school record of enrollment in two different schools on dates at least five years apart is acceptable as two different records. Records must be signed by the principal of the school or superintendent of schools. Records are not acceptable if signed by a teacher.
2. A state or federal census record (established near your date of birth)
3. A statement showing the date of birth signed by the physician or midwife who was in attendance at the birth
4. A notarized copy of the birth entry in a family Bible
5. An insurance policy that shows age or date of birth
6. Marriage record that shows age at the time of marriage and the year it took place. This record must be at least 20 years old.
7. A passport
8. Certified military service record
9. A child's birth certificate that shows age of parent(s)
10. A record from the Social Security Administration verifying date of birth
11. Any dated legal document, at least 20 years old, that gives the individual's age or date of birth. Acceptance is subject to approval of the Board of Trustees of the Teachers' Retirement System of Louisiana.
12. A driver's license

In addition to the documents listed above, the following documents, for those born in a foreign country, can be submitted:

1. A foreign passport
2. An immigration record established upon arrival in the United States
3. A naturalization record (citizenship paper)
4. An alien registration card